

# **Module C:**

# **Customer Service**

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## Overview

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### Introduction

This module will help improve your customer service skills at WIC.

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### Learning Objectives

After completing this module the Nutrition Assistant will be able to:

- define customer service,
- explain why customer service is important at WIC,
- describe possible outcomes of bad customer service at WIC,
- identify 3 important parts of welcoming participants,
- assess type/purpose of each visit efficiently,
- identify ways to give difficult or negative information to participants in a positive way,
- identify 2 important elements to resolving conflicts with upset people,
- determine when to ask for help,
- explain how to answer the phone appropriately, and
- show in a role play how to give good customer service while in the midst of conflict.

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\* Words that you may not know are **underlined**. Definitions for these words can be found in the **Glossary** at the end of the module. (Note: Words are only underlined the first few times they appear in the text.)

## What is Customer Service?

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**Definition of Customer Service**

Customer service is how we meet the needs of the people who use our services.

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**Definition of Customer**

A customer is any person who uses our services.

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**Types of Customers**

There are 3 types of customers:

- external customers,
  - internal customers, and
  - former customers.
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**External Customers**

External customers are the people who use the services of your agency. Examples of external customers are participants, referring agencies, and food stores.

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**Internal Customers**

Internal customers are the people you work with. Examples of internal customers are your supervisor, co-workers, or anyone else who works within your agency.

Sometimes we do not think of our co-workers as customers. But for you to do your job well you need the help of you co-workers as much as they need your help. By treating your co-workers as important customers you can make sure your agency works as well as possible.

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## What is Customer Service? (continued)

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### **Former Customers**

Former customers are the people who have used the services of your agency in the past but do not use the service now. Examples of former customers are former participants, former staff of your agency, or former WIC food stores.

Former customers are very important to WIC because they are the key to WIC's reputation. Making sure that all WIC customers will be happy as former customers will help make sure that WIC always stays popular.

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### **Levels of Customer Service**

There are 3 levels of customer service. These are:

- rudeness,
- indifference, and
- exceptional service.

**Most customers (68%) stop doing business with a company due to rudeness or indifference.** At WIC we strive for exceptional service!

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### **Learning Activity 1**

To learn more about your WIC agency's customers you may want to try **Learning Activity 1** found at the end of this module.

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## Why Is Customer Service Important?

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### Participant Satisfaction

WIC depends on its employees to satisfy its customers. When staff give poor customer service the participant suffers!

If a WIC participant does not feel satisfied with her/his experience at WIC s/he may not come back. S/he may then miss out on getting:

- healthy, nutritious foods,
- useful nutrition education, and
- important referrals.

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### WIC Funding

Although our customers need our services, we also need them. Your WIC agency gets a certain amount of money for each participant it serves. If participants do not come back to your agency because of poor customer service there could be less money for your agency to pay for staff.

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### Cost Effectiveness

Good customer service also helps WIC be cost-effective. It helps prevent:

- missed appointments and
- wasted time spent enrolling or counseling participants who do not come back.

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### Learning Activity 2

To learn more about the importance of customer service you may want to try **Learning Activity 2** found at the end of this module.

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## Giving Exceptional Customer Service

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### Exceptional Customer Service

Exceptional customer service is service that:

- anticipates the customer's needs,
  - tries to understand what the customer is thinking, and
  - meets and exceeds the customer's highest expectations.
- 

### Basic Customer Needs

There are 4 basic customer needs. A customer needs to feel:

- welcome,
  - understood,
  - important, and
  - comfortable.
- 

### Meeting Basic Customer Needs

When working with a participant you will want to make sure you meet her/his needs. You may want to use the suggestions below to guide you.

Need	Suggestions
<b>Welcome</b>	<ul style="list-style-type: none"><li>• Be friendly.</li><li>• Greet participant.</li><li>• Introduce yourself.</li><li>• Use a positive tone of voice.</li></ul>
<b>Understood</b>	<ul style="list-style-type: none"><li>• Listen carefully.</li><li>• Repeat or rephrase to make things clearer.</li></ul>
<b>Important</b>	<ul style="list-style-type: none"><li>• Refer to participant by name.</li><li>• Show interest in participant's family.</li><li>• Ask open-ended questions.</li><li>• Answer questions.</li><li>• Thank participant for coming.</li></ul>
<b>Comfortable</b>	<ul style="list-style-type: none"><li>• Explain what to expect during the session.</li><li>• Use open body language.</li><li>• Show concern.</li></ul>

## Giving Exceptional Customer Service (continued)

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### Customer Perceptions

Perception is how we see, hear or understand a situation.

Perception is:

- what is **heard**, not what is said,
- what is **seen**, not what is shown,
- what is **understood**, not what is meant.

A customer's perceptions are the customer's reality!

---

### Determining Perceptions

Understanding a customer's perceptions is not easy. No two people see a situation exactly the same!

A customer does NOT always think the way you do. S/he may therefore not see a situation the way you do. Always check to see what the customer is thinking. Never make assumptions!

---

### Meeting & Exceeding Expectations

To give exceptional customer service you will need to make sure you know your customer's attitudes, beliefs, ideas and feelings. In other words, try to see things the way your customer does. This will help you meet and exceed her/his expectations.

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### Learning Activity 3

To learn more about what customers need and their perceptions you may want to try **Learning Activity 3** found at the end of this module.

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## Types of Visits and Forms

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### Important to Customer Service

To give participants exceptional customer service you will also need to:

- know the procedures your agency uses for the different types of participant visits and
  - know what forms to use with at each type of visit.
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### Types of Visits

You will want to make sure participants get the kind of appointments they need. You will also need to know the procedure your agency uses for the different types of participant visits.

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### Forms

You will also need to be familiar with the many forms your agency uses. You will need to know which forms are used with the different types of visits.

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### Learning Activity 4

To learn more about the types of visits and the forms used at your local WIC agency you may want to try **Learning Activity 4** found at the end of this module.

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## Giving a Participant Difficult or Negative Information

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### **Difficult or Negative Information**

There will be times when you will have to tell a participant some difficult or negative information.

Examples of difficult or negative information may include telling:

- an applicant s/he is not eligible for WIC,
  - a participant s/he will no longer be served by WIC, or
  - a participant s/he may have to wait for a long time.
- 

### **Present Information in a Positive Way**

Presenting difficult or negative information is not easy. But there are ways to present this information in a positive way.

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### **Learning Activity 5**

To learn more about how to present difficult or negative information you may want to try **Learning Activity 5** found at the end of this module.

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## Resolving Conflicts with Upset People

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**Definition of Conflict**

Conflict is disagreement between people.

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**Conflict at WIC**

Most of the people at WIC will be quite happy with how things work. Sometimes, however, a participant or co-worker may get upset.

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**Resolving Conflict**

Resolving conflict means finding a way to take care of the disagreement or problem that all the people in the conflict can agree to.

When resolving conflict with upset people remember to:

- always stay calm and
  - first deal with the person's feelings and then deal with the problem.
- 

**Suggestions for Resolving Conflict**

To handle conflict you may want to follow the steps listed in the table on the next page.

Some of the steps may need to be slightly changed depending on the participant's culture.

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## Resolving Conflicts with Upset People (continued)

### Suggestions for Resolving Conflict

<b>Stay calm.</b> <ul style="list-style-type: none"><li>• Think before you talk.</li></ul>
<b>Deal with the person's feelings first.</b> <ul style="list-style-type: none"><li>• Listen to the person's whole story.</li><li>• Do not interrupt.</li><li>• Put yourself in the person's place.</li><li>• Use words such as "I see" or "I can understand how you must feel."</li><li>• Do not become defensive.</li></ul>
<b>Ask Questions.</b> <ul style="list-style-type: none"><li>• Ask if it's okay to get more information. Use words as "Do you mind if I ask you a few questions to help me understand what happened?"</li><li>• Ask open-ended questions (questions that cannot be answered with "yes", "no" or short answers) to get more information.</li><li>• Ask closed-ended questions (questions that can be answered with "yes", "no" or short answers) to make sure what you heard is right.</li></ul>
<b>Give feedback.</b> <ul style="list-style-type: none"><li>• Restate what you think the participant is thinking in your own words. For example, "It sounds like you were very disappointed with the way your appointment went."</li></ul>
<b>Summarize the problem.</b> <ul style="list-style-type: none"><li>• Describe what you think the problem is.</li><li>• Describe the person's concern.</li><li>• Check to see if you have described the person's situation accurately.</li></ul>
<b>Deal with the problem.</b> <ul style="list-style-type: none"><li>• Find out what the person wants. Use words such as, "What would you like us to do?"</li><li>• Suggest alternatives. If you cannot do what the person wants, offer actions you can take.</li><li>• Try to reach a realistic compromise. If <u>you</u> cannot resolve the problem find someone who can help you.</li><li>• If the problem was caused by the WIC agency admit the error and apologize.</li><li>• Agree on a solution.</li><li>• Start on the solution and explain what will happen.</li></ul>

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## Resolving Conflicts with Upset People (continued)

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### **Learning Activity 6**

To learn more about resolving conflict with upset people you may want to try **Learning Activity 6** found at the end of this module.

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## Communicating By Telephone

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### **Important to Customer Service**

While working at WIC you will probably use the phone. Communicating by phone is an important part of customer service.

In some WIC agencies there are special staff who answer phones. In other agencies, many staff may do the job of answering phones.

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### **Phone Use**

You will use the phone for a variety of reasons. You may use the phone to:

- give information about WIC,
  - schedule an appointment,
  - answer a question,
  - give directions on how to get to your site,
  - refer someone to a health care agency, or
  - handle a complaint.
- 

### **Telephone Tips**

The next page lists some suggestions that may help you communicate by phone. Many of these suggestions may also be used for when you talk to someone face-to-face.

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## Communicating By Telephone (continued)



### Telephone Tips

- **Be ready.** Have pencil or pen and paper ready.
- **Answer promptly.** Answer within 2 to 4 rings.
- **Be friendly.**
- **Be polite.** Use “please”, “thank you” and “you’re welcome.”
- **Identify yourself.** Say your agency’s name first, and then your name.
- **Repeat the caller’s name.** Saying the caller’s name helps her/him pay attention to what you say.
- **Listen carefully.** Make sure you understand what the caller is saying.
- **Give the caller your full attention** If you need to deal with something during a phone call ask the caller if s/he can wait.
- **Don’t guess at answers.** If you are not certain about information tell the caller you will find out and call back.

## Communicating By Telephone (continued)

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### Recording a Message

When taking messages over the phone, write down:

- the caller's name,
- the caller's telephone number with area code,
- the date and time,
- what the caller needs,
- any additional information, and
- your name or initials.

Make sure the message is accurate. Repeat information such as phone numbers, spelling of a name, or addresses back to the caller.

---

### Putting the Caller on Hold

Being put on hold can be a very frustrating experience. If at all possible, avoid putting a caller on hold.

Always ask the caller if it is okay for you to put her/him on hold. Never put a caller on hold without asking. A caller should only be put on hold for **1 minute**. If you need more time ask the caller if you can call back.

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### Transferring Calls

Being transferred as a caller can also be a very frustrating experience. Transfer a call only when absolutely necessary. If you do transfer a call:

- be sure the co-worker you are transferring the call to can take care of the call,
  - give the caller the name and phone number of the co-worker you are transferring the call to, and
  - explain to your co-worker what the call is about before you hang up.
- 

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## Communicating By Telephone (continued)

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### **Learning Activity 7**

To learn more about communicating by phone you may want to try **Learning Activity 7** found at the end of this module.

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## Asking for Help

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### It's Okay to Ask for Help

Asking for help is okay! Everyone at WIC will have a time when they will need to ask for help.

Most of the time you will be able to do your job quite well. But there may be a time when you will have more than you can handle.

It is important that you ask for help when you need it. Not asking for help may cause a situation to get worse.

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### When to Ask

You may need to ask for help when you are:

- sick,
  - not sure about how to handle a situation,
  - dealing with someone who may be violent,
  - trying to resolve a conflict and cannot reach a workable solution,
  - not comfortable working with a participant, or
  - in need of help from someone with special skills such as someone who has training in domestic violence.
- 

### Whom to Ask

When you need help go to the person your agency recommends. This may be your supervisor, mentor, or a co-worker. Check to see what your agency's procedure is regarding this.

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### Learning Activity 8

To learn more about when to ask for help and whom to contact in your agency you may want to try **Learning Activity 8** found at the end of this module.

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## Summary

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**Customer Service**

Customer service is how we meet the needs of the people who use our services.

In WIC, customer service is key to helping our participants and to keeping WIC in business to serve the local community.

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**Exceptional Customer Service**

Exceptional customer service means:

- anticipating the customer's needs,
  - trying to understand what the customer is thinking, and
  - meeting and exceeding the customer's expectations.
- 

**Giving Difficult or Negative Information**

When giving participants difficult or negative information. Present the information in a positive way.

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**Resolving Conflict**

Resolving conflict means finding a way to take care of the disagreement or problem that all the people in the conflict can agree to.

When resolving conflict, stay calm and deal with the person's feelings before dealing with the problem.

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## Summary (continued)

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### Telephone Communication

Telephone communication is an important part of customer service at WIC. When using the phone:

- be polite, friendly and caring,
  - record messages accurately,
  - avoid putting callers on hold, and
  - transfer callers only when necessary.
- 

### Asking for Help

Everyone at WIC finds a need to ask for help. Ask for help when you cannot handle a situation. Asking for help is okay and can prevent a difficult situation from getting worse.

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## Glossary

case study- A case study is a description of a person or situation that is studied to decide on the best plan of action.

conflict- Conflict is disagreement between people.

customer- A customer is a person who uses the services of an agency.

customer service- Customer service is how an agency meets the needs of the people it serves.

exceptional customer service- Exceptional customer service is service that anticipates the customer's needs, determines the customer's perceptions, and meets and exceeds the customer's highest expectations.

external customer- An external customer is any of the people who use the services of an agency.

former customer- A former customer is the person who has used the services of an agency in the past but does not use the services now.

internal customer- An internal customer is any of the people with whom a person works.

perception- Perception is how we see, hear, or understand a situation.

resolving conflict- Resolving conflict means finding a way to take care of the disagreement or problem that all the people in the conflict can agree to.

role play- A role play is when 2 or more people act out a scene as though it was "real life". "Props" such as baby dolls or food models are not needed but may be helpful.

## Progress Check

1. Give an example of each type of customer.

Internal:

External:

Former:

2. What is the most common reason for a customer to stop doing business with a company?
3. List 2 reasons why good customer service is important.
  - 1.
  - 2.
4. Give 2 suggestions that would help meet each of the 4 basic customer needs listed below.

Basic Customer Need	Suggestion
welcome	<ol style="list-style-type: none"><li>1.</li><li>2.</li></ol>
understood	<ol style="list-style-type: none"><li>1.</li><li>2.</li></ol>
important	<ol style="list-style-type: none"><li>1.</li><li>2.</li></ol>
comfortable	<ol style="list-style-type: none"><li>1.</li><li>2.</li></ol>

## Progress Check (continued)

5. Restate each of the phrases so that the difficult or negative information is given in a positive way.

<i>"You're wrong---we don't do certification over the phone."</i>	
<i>"Sit down. You have a long wait ahead of you!"</i>	
<i>"The other staff person was wrong! That's not our policy!"</i>	
<i>"You are disqualified! We can't serve you!"</i>	

6. Mark the following telephone tips as "TRUE" or "FALSE".

- \_\_\_\_\_ Always have paper and pen ready when answering the phone.
- \_\_\_\_\_ Do not worry about the correct spelling of names when recording a message.
- \_\_\_\_\_ Give out information even if you are somewhat unsure.
- \_\_\_\_\_ Be polite and listen carefully when answering the phone.
- \_\_\_\_\_ Putting a caller on hold for 2 to 3 minutes is fine during busy times.
- \_\_\_\_\_ Be sure to identify your agency's name when answering the phone.

## Progress Check (continued)

7. The steps listed below may be used when resolving conflict with an upset person. Number these steps from “1” to “6” in the order that would work best.

- \_\_\_\_\_ Deal with the problem.
- \_\_\_\_\_ Stay calm.
- \_\_\_\_\_ Ask questions.
- \_\_\_\_\_ Deal with the person’s feelings.
- \_\_\_\_\_ Give feedback.
- \_\_\_\_\_ Summarize the problem.

8. List 3 situations in which a staff person might need to ask for help.

- 1.
- 2.
- 3.

## Learning Activities

The following activities are included and are recommended for interactive learning:

- Learning Activity 1: Your Customers
- Learning Activity 2: Your “Best” & “Worst” Customer Service Experience
- Learning Activity 3: Customer Needs & Perceptions
- Learning Activity 4: Types of Visits & Forms
- Learning Activity 5: Giving Negative Information in a Positive Way
- Learning Activity 6: Role Plays
- Learning Activity 7: Telephone Communication Case Studies
- Learning Activity 8: Asking for Help

## Activity 1: Your Customers

- Learning Objectives** After completing this activity, the Nutrition Assistant will be able to:
- identify external, internal, and former customers.

**Background**

External customers are the people who use the services of your agency such as participants, referral agencies, and food stores.

Internal customers are the people with whom you work such as your supervisor, co-workers or anyone else who works within your agency.

Former customers are the people who have used the services of your agency in the past but do not use the service now. Examples of former customers are former participants, former staff of your agency, or former WIC food stores.

**Instructions**

1. Think about the many people you talk to or will soon be talking to during your workday at WIC. **These people are all your customers.**
2. Using the form on the next page, fill in the names or positions of people who are external and internal customers and some things they may need or needed from you.
3. Now think of those customers as “former customers”. What would you want them to say about you and their experiences at WIC?
4. Discuss your responses with your supervisor or mentor.

**Activity 1: Your Customers**

<b>Type of Customers</b>	<b>What They Need/Needed from You</b>
<b>External:</b>  1.  2.  3.  4.	
<b>Internal:</b>  1.  2.  3.  4.	

## Activity 2: Your “Best” & “Worst” Customer Service Experience

**Learning Objectives** After completing this activity, the Nutrition Assistant will be able to:

- identify why customer service is so important at WIC.

**Instructions**

1. Think back to a time when you were a customer and got:

- “the best” service and
- “the worst” service.

Examples may be a time when you ate in a restaurant, shopped at a store, went to the dentist, or called about a bill.

2. Using the form on the next page, write down a brief summary of your experiences and what made each experience either wonderful or awful.

3. You may want to discuss your experiences with your mentor or supervisor.



## Activity 2: Your “Best” & “Worst” Customer Service Experience

1. Briefly describe your **“best”** customer service experience.

What made your experience so wonderful?

2. Briefly describe your **“worst”** customer service experience.

What made your experience so awful?

## Activity 3: Customer Needs & Perceptions

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**Learning Objectives** After completing this activity, the Nutrition Assistant will be able to:

- identify how our needs and perceptions greatly affect our satisfaction as customers.

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**Background**

There are 4 basic customer needs. A customer needs to feel:

- welcome,
- understood,
- important, and
- comfortable.

Perception is how we see, hear or understand a situation.

Perception is:

- what is **heard**, not what is said,
- what is **seen**, not what is shown,
- what is **understood**, not what is meant.

A customer's perceptions are the customer's reality!

---

**Instructions**

1. Ask 3 co-workers to answer the first 2 questions on the next page.
  2. Why is perception such an important part of customer service?
-

**Activity 3: Customer Needs & Perceptions**

1. Think about what is important to you when you go out to a restaurant. What determines “exceptional service” when you go out to eat? Think about things such as cost, speed of service, attitude of waiter/waitress, taste, etc.

**Coworker 1:**

**Coworker 2:**

**Coworker 3:**

2. Based on the responses of your co-workers, how did their perceptions of what is exceptional service differ? How were they the same? Would a restaurant be able to meet the needs of all of its customers?

## Activity 4: Types of Visits & Forms

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**Learning Objectives** After completing this activity, the Nutrition Assistant will be able to:

- identify the types of visits and forms used at her/his local WIC agency.

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**Background**

To give good customer service you must be able to:

- help participants get the kind of appointments they need and
- get important information from forms.

It is important that you know the procedure your agency uses for the types of visits at WIC. You will also need to be familiar with the many forms your agency uses.

This activity will help you identify the way your agency handles a visit or call from a participant.

---

**Instructions**

1. Talk to your supervisor or mentor about the different types of visits or calls handled by your agency and the forms used.
  2. Write down your notes on the form found on the next page. If your agency has a written document describing these procedures, you may want to attach it to the form.
  3. Make sure to observe several coworkers as they handle the variety of visits and use the forms.
-

**Activity 4: Types of Visits & Forms**

<b>VISITS</b>	
<b>Situation/Type of Visit</b>	<b>Procedure</b>
<b>1.</b>	
<b>2.</b>	
<b>3.</b>	
<b>4.</b>	
<b>5.</b>	

**Activity 4: Types of Visits & Forms**

<b>FORMS</b>	
<b>Form</b>	<b>Used For</b>
<b>1.</b>	
<b>2.</b>	
<b>3.</b>	
<b>4.</b>	
<b>5.</b>	

## **Activity 5: Giving Negative Information in a Positive Way**

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**Learning Objectives** After completing this activity, the Nutrition Assistant will be able to:

- Tell participants difficult or negative information in a positive way.

---

**Instructions**

1. The next few pages contain 5 situations in which the WIC staff person has given difficult or negative information.
  2. For each of the statements made, give a more positive alternative in the box provided.
  3. You may want to discuss your alternatives with your mentor or a supervisor.
-

### **Activity 5: Giving Negative Information in a Positive Way**

1. *Nancy Billings, who is pregnant, is not eligible for WIC. Her income is \$1,000 over the annual limit. A WIC staff person tells her,*

***“You are not eligible! Not much we can do for you here!”***

**Better words:**

2. *Mei Li Hong walks into the WIC site and checks in at the front desk. Two staff people are sick and appointments are running about 1 hour behind. The WIC staff person says,*

***“Sit down. There’s a long wait. We’re running behind schedule!”***

**Better words:**



**Activity 5: Giving Negative Information in a Positive Way**

3. Kim Nguyen who is Vietnamese speaks limited English. The clinic's Vietnamese interpreter is out sick and there is no one else who speaks Vietnamese. A WIC staff person is counseling her and says,

***“We can’t help you since our interpreter is not here.”***

**Better words:**

4. Patty Coleman shows up at the WIC site but her appointment is not until the following week. She tells the person at the front desk that she checked her calendar and can't believe the appointment is next week! The WIC staff person tells her,

***“You made a mistake! Come back next week!”***

**Better words:**

### **Activity 5: Giving Negative Information in a Positive Way**

5. *Roberta Jones does not nurse her infant son who is now 7 months old. She can no longer be served by WIC and must be disqualified from WIC. The WIC staff person says:*

***“We have to disqualify you.”***

**Better words:**

## Activity 6: Role Plays

---

**Learning Objectives** After completing this activity, the Nutrition Assistant will be able to:

- show how to give good customer service while in the midst of conflict.

---

**Background**

When resolving conflict with upset people:

- stay calm,
- first deal with the person's feelings and
- then deal with the problem.

A role play is when 2 or more people act out a scene as though it was “real life”. “Props” such as baby dolls or food models are not needed but may be helpful.

---

**Instructions**

1. Ask your mentor, supervisor, or a co-worker to role play any 3 of the 5 roles (A-E) described on the following page.
1. Using the information you have learned about good customer service, act out the role of a WIC Nutrition Assistant for each of the 3 situations.
2. Mentor/Supervisor/Co-Worker: Using the role plays as your guide, act out the role of the participant or co-worker. Try to be as realistic as possible.
3. After each session, ask your co-worker to tell you what s/he noticed. Make sure to ask for your strengths as well as weaknesses.

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## Activity 6: Role Plays

- 
- Role Play A** Angela Fernandez is new to WIC. She is upset because she feels she should get more food instruments. (She has 5 kids and has a hard time getting enough food to feed her kids.) She starts to argue about things not being fair.
- 
- Role Play B** Katie Green calls the WIC site to schedule an appointment. She says she wants an appointment on a Friday. The site is only open Tuesdays and Thursdays. Another site is open on Fridays but is far from where she lives. She becomes angry that the site cannot meet her need.
- 
- Role Play C** Anna Petrovich suddenly begins to sob when you tell her she is not income eligible for WIC. She tells you she “must” be eligible because she needs food for her kids. She looks over at the income table and suddenly tells you “but I have 5 kids!” even though she just told you she has 3.
- 
- Role Play D** Keisha Johnson calls by telephone to file a complaint about the agency’s policy of no walk-ins. She came in after work several times last week but the agency was not able to serve her. She angrily tells you, “Your agency doesn’t think about our needs!”
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- Role Play E** During a nutrition education class Ruby Clark, a participant, interrupts the class several times. Each time she says, “These classes are so boring! I’ve heard this all before!” You notice the other participants are becoming quite annoyed.
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## Activity 7: Telephone Communication Case Studies

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**Learning Objectives** After completing this activity, the Nutrition Assistant will be able to:

- communicate by telephone better through discussion of case studies.

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**Instructions**

1. Read each of the case studies on the following pages.
  2. Say what went wrong in each case and suggest what could have been done to improve the situation.
  3. Write your ideas on the forms that follow.
  4. Talk to your supervisor or mentor if you need some help.
  5. When you are finished, discuss your ideas with your supervisor or mentor.
-

**Activity 7: Telephone Communication Case Studies****Case Study 1:**

Maria is counseling a new participant. Her telephone rings. She tells the participant “excuse me” and takes the call. The call is from a co-worker who needs some information on a new procedure. Maria again says, “excuse me” to the participant and quickly gets up from her desk to grab the agency’s procedure manual.

**What went wrong?****How could Maria have given exceptional customer service?**

**Activity 7: Telephone Communication Case Studies****Case Study 2:**

Rose usually answers the main telephone line for her WIC agency. She is just getting back from lunch and is still talking to her co-worker about what happened to her last weekend when the telephone rings. She is almost finished telling her story and decides to continue talking to her co-worker. On the seventh ring she picks up the phone and says in a rather dull voice, "River County WIC."

**What went wrong?****How could Rose have given exceptional customer service?**

**Activity 7: Telephone Communication Case Studies****Case Study 3:**

Matt is answering the phones for his agency. It is 4:55 pm and the site will close in 5 minutes. The phone rings. The caller is angry. She says she did not get enough food instruments and wants to know if she can get things worked out right away because she is low on food. Matt tells her, "I can't help you. The site will be closing in a few minutes." The caller hangs up.

**What went wrong?****How could Matt have given exceptional customer service?**



**Activity 7: Telephone Communication Case Studies****Case Study 4:**

Carl answers the phone. The caller asks for his supervisor. He tells her, “She is on vacation. Can I take a message?” He takes down the following note:

*Eleanor called regarding a meeting. Please call her back.*

*---Carl.*

**What went wrong?****How could Carl have given exceptional customer service?**

**Activity 7: Telephone Communication Case Studies****Case Study 5:**

A co-worker transfers a call to Jackie. Jackie is not clear as to why she got the call and tells the caller so. The caller is frustrated and tells her, “Your agency better get your act together, I was on hold for 10 minutes and still haven’t gotten anywhere! Let me talk to your supervisor!” Jackie tells the caller that she was not responsible and transfers the caller to her supervisor. She is glad to pass the caller on to someone else!

**What went wrong?****How could Jackie have given exceptional customer service?**

## Activity 8: Asking for Help

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**Learning Objectives** After completing this activity, the Nutrition Assistant will be able to:

- know when and whom to ask for help at her/his local agency.

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**Background**

It is important to ask for help when you do not know how to handle a situation.

You may need to ask for help when you are:

- sick,
- not sure about how to handle a situation,
- dealing with someone who may be violent,
- trying to resolve a conflict and cannot reach a workable solution,
- not comfortable working with a participant, or
- in need of help from someone with special training such as someone who has training in domestic violence.

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**Instructions**

1. Discuss with your supervisor and/or mentor:
    - when to ask for help and
    - whom to talk to at your agency.
  2. Using the information you get from your supervisor and/or mentor, complete the form on the next page.
  3. Write down any information that may help you under “Notes.”
-

**Activity 8: Asking for Help**

<b>Situation</b>	<b>Contact Person</b>
<b>Notes:</b>	

## Progress Check Answers

1. Give an example of each type of customer.

Internal: ***co-workers or a supervisor or anyone who works within an agency.***

External: ***participants, referring agencies, or WIC food stores***

Former: ***former customers, former local agency staff, former WIC stores---anyone that was once an internal or external customer of WIC***

2. What is the most common reason for a customer to stop doing business with a company?

***The most customers (68%) stop doing business with a company because of rudeness or indifference.***

3. List 2 reasons why good customer service is important.

***Any 2 of the following reasons are fine:***

- 1. Good customer service maintains WIC caseload.***
- 2. Good customer service helps WIC be cost-effective.***
- 3. Good customer service helps WIC satisfy participants.***
- 4. Good customer service helps WIC agencies get funding.***

## Progress Check Answers (continued)

4. Give 2 suggestions that would help meet each of the 4 basic customer needs listed below.

<b>Basic Customer Need</b>	<b>Suggestions</b> <i>(any 2 of the following)</i>
<b>Welcome</b>	<ul style="list-style-type: none"> <li>• <b><i>Be friendly.</i></b></li> <li>• <b><i>Greet participant.</i></b></li> <li>• <b><i>Introduce yourself.</i></b></li> <li>• <b><i>Use a positive tone of voice.</i></b></li> </ul>
<b>Understood</b>	<ul style="list-style-type: none"> <li>• <b><i>Listen carefully.</i></b></li> <li>• <b><i>Repeat or rephrase to make things clearer.</i></b></li> </ul>
<b>Important</b>	<ul style="list-style-type: none"> <li>• <b><i>Refer to participant by name.</i></b></li> <li>• <b><i>Show interest in participant's family.</i></b></li> <li>• <b><i>Ask open-ended questions.</i></b></li> <li>• <b><i>Answer questions.</i></b></li> <li>• <b><i>Thank participant for coming.</i></b></li> </ul>
<b>Comfortable</b>	<ul style="list-style-type: none"> <li>• <b><i>Explain what to expect during the session.</i></b></li> <li>• <b><i>Use open body language.</i></b></li> <li>• <b><i>Show concern.</i></b></li> </ul>

5. Restate each of the phrases so that the difficult or negative information is given in a positive way.

***Here are some suggested responses:***

<i>"You're wrong---we don't do certification over the phone."</i>	<b><i>"Our policy is to certify applicants in person at a WIC site..."</i></b>
<i>"Sit down. You have a long wait ahead of you!"</i>	<b><i>"Please feel free to take a seat. The wait may be an hour. Will that work for you?"</i></b>
<i>"The other staff person was wrong! That's not our policy!"</i>	<b><i>"Let me explain our policy to you."</i></b>
<i>"You are disqualified! We can't serve you!"</i>	<b><i>"We currently do not serve.... Is there anything you would like me to do for you?"</i></b>

## Progress Check Answers (continued)

6. Mark the following telephone tips as “TRUE” or “FALSE”.

**TRUE** Always have paper and pen ready when answering the phone.

**FALSE** Do not worry about the correct spelling of names when recording a message.

**FALSE** Give out information even if you are somewhat unsure.

**TRUE** Be polite and listen carefully when answering the phone.

**FALSE** Putting a caller on hold for 2 to 3 minutes is fine during busy times.

**TRUE** Be sure to identify your agency’s name when answering the phone.

7. The steps listed below may be used when resolving conflict with an upset person. Number these steps from “1” to “6” in the order that would work best.

6 Deal with the problem.

1 Stay calm.

3 Ask questions.

2 Deal with the person’s feelings.

4 Give feedback.

5 Summarize the problem.

## **Progress Check Answers (continued)**

8. List 3 situations in which a staff person might need to ask for help.

***Responses may be any 3 of the following:***

***When a staff person is:***

- 1. sick***
- 2. not sure about how to handle a situation***
- 3. dealing with someone who may be violent***
- 4. trying to resolve a conflict and cannot reach a workable solution***
- 5. not comfortable working with a participant***
- 6. in need of help from someone with special training such as someone who has training in domestic violence***